Highlights of Ontario's Road-accessible Resource-based Tourism Industry

CNFER Technical Report TR-011
July 2003

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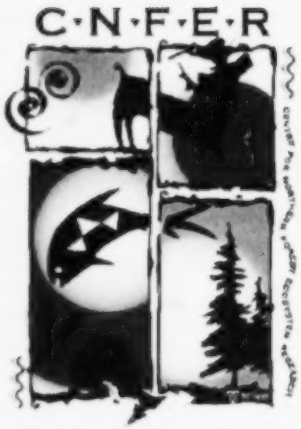

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by

S.A. Browne
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TABLE OF CONTENTS

Page

Acknowledgements iii
List of Tables v
List of Figures v
Executive Summary vii
1.0 Introduction 1
2.0 Methods 1
2.1 Definitions 1
2.2 Survey Methods 3
2.3 Potential Sources of Error 3
3.0 Highlights of Questionnaire Responses 5
3.1 Business Characteristics and Facilities 5
3.1.1 Package Types 5
3.1.2 Accommodation Type 6
3.1.3 Business Statistics 7
3.1.4 Amenities 8
3.2 Clientele and Visitation Rates 9
3.2.1 Visitation Rates 9
3.2.2 Origin of Visitors 10
3.2.3 Marketing 11
3.3 Activity Based Questions 12
3.3.1 Hunting 12
3.3.2 Moose Hunting 13
3.3.3 Non-consumptive Activities 14
3.4 Emphasis on the Fishing Product 15
3.4.1 Fish Species 15
3.4.2 Fishing Package Pricing 17
3.4.3 Additional Questions Related to Fishing 18
3.5 Comparison to the Remote and Semi-remote Resource-based Tourism Product 19
3.5.1 Business Characteristics and Facilities 19
3.5.2 Clientele 21
3.5.3 Fishing Quality 21
4.0 Concluding Remarks 24
References 25

List of Tables

Page

Table 1 4
Response rate and estimated number of road-accessible resource-based tourism establishments in Northern Ontario.

List of Figures

Figure 1 2
Delineation of Northern Ontario study area, showing Northeast and Northwest regions and locations of businesses requested to complete a survey.

Figure 2 6
Do you offer accommodation packages centred on...(fishing, hunting, non-consumptive activities, and hotel-model type) accommodation?

Figure 3 7
What best describes this facility?

Figure 4 8
How many of your accommodation units include the following amenities?

Figure 5 9
Which of the following amenities are available in a central location to all of your guests?

Figure 6 10
Approximately, what percentage of guest nights at this establishment in 2001 were primarily for...

Figure 7 11
The origin of clients visiting road-accessible resource-based tourism establishments in northwestern and northeastern Ontario, 2001.

Figure 8 12
What methods of marketing and/or advertising did you employ in 2001?

Figure 9 13
If yes, how important are the following game/activities to your hunting clients?

Figure 10 14
If yes, what activities do your clients primarily pursue?

Figure 11 16
In June (July for bass), how many of these fish could an average angler expect to catch in four hours of fishing?

Figure 12 16
In June (July for bass), what would be the average weight of one of these fish?

Figure 13 18
Do you offer any of these additional services at this facility?

Figure 14 20
Approximately, what percentage of guest nights at this establishment in 2001 were primarily for ... *and* About what percentage of the person nights at this establishment in 2000 were primarily for...

Figure 15 22
In June (July for bass), how many of these fish could an average angler expect to catch in four hours of fishing? Separated by access type.

Figure 16 23
In June (July for bass), what would be the average weight of one of these fish (please specidy in pounds)?

Figure 17 23
Are you concerned about access to this water body by non-tourism guests? *and* Do you feel there are road access problems around the water body?

Executive Summary

This report provides a basic description of Ontario's road-accessible resource-based tourism establishments. The data presented here originated from a survey conducted with road-based tourism operators in the fall and winter of 2001-2002. Some of the key findings of the study are listed below.

Business Characteristics and Facilities

- There are an estimated 715 road-accessible resource-based tourism facilities in the study area.
- Nearly 60 percent of facilities offered fishing packages. Hunting packages were offered at almost the same percentage of facilities.
- Housekeeping lodges and cottages were the most popular types of accommodation for the road-accessible resource-based tourism industry.
- Most accommodation units were well equipped, featuring amenities such as showers, lighting, bedrooms, decks, and barbecues.
- The median number of units (cabins or rooms) available for rent at a single establishment in the year 2001 was eight.

Clientele and Visitation Rates

- The majority of the facilities were open for between 19 and 30 weeks in 2001. Fifteen percent of the facilities were open for 52 weeks of the year.
- The average road-accessible establishment saw 300 guests visit during the 2001 operating season. The median length of stay was six nights.
- Fishing trips of varying lengths accounted for 72 percent of the guest nights at road-accessible establishments.
- For northwestern Ontario establishments, the United States Midwest was the major drawing market. For establishments in northeastern Ontario, southern Ontario was the largest single market area.
- Brochures and business web sites were the two most popular forms of product advertising for road-accessible resource-based tourism establishments.

Activity Based Questions

- Almost three of five (57%) establishments offered hunting packages. The main species that guests pursued were bear (very important at 67% of sites) and moose (very important at 64% of sites).
- About two in five (42%) establishments offered non-consumptive packages at their tourism sites. The most popular non-consumptive activities were wildlife and/or bird watching and canoeing and/or kayaking.

Emphasis on the Fishing Product

- Walleye was the primary target species at 75 percent of the establishments offering fishing.
- Northern pike was reported by operators to be a secondary target species at 50 percent of the establishments offering fishing.
- The median catch per unit effort (i.e. expected catch rate for one hour of fishing) for walleye was one, with an expected weight of two pounds.
- The average weekly price for a housekeeping fishing package at a road-accessible resort in 2001 was about $475 Canadian.

Comparison of Road-accessible Tourism Establishments to Remote (i.e. fly-in accessible) and Semi-remote (i.e. boat or train accessible) Establishments

- The fishing product is vitally important to all three tourism products, but it is most important for remote tourism establishments.
- Road-accessible sites draw much more heavily from geographically close markets than do more remote establishments.
- Remote and semi-remote tourism establishments charged significantly more for accommodation packages than did road-accessible establishments. A remote housekeeping, fishing package was about double that of a similar package at a road-accessible establishment.
- The number of fish an angler could expect to catch at remote establishments was much greater than the expected catch at a road-accessible establishment. However, the expected weight of the fish was not related to the accessibility of the establishment.
- Operators had greater concerns about non-guest access of water bodies at remote and semi-remote establishments than did operators of road-accessible establishments.

1.0 Introduction

The Ontario Ministry of Natural Resources (OMNR) has the need for basic information about Ontario's resource-based tourism product. This need for information stems from the economic importance of resource-based tourism to the Northern Ontario economy. The tourism industry helps to strengthen and diversify Northern Ontario's economy and it brings tourism dollars and jobs to the more remote regions of the province. Land-use planners and resource management decision-makers also need information on the tourism industry. As the demand for our natural resources increases, the potential for conflict between resource extraction companies and the tourism industry increases. Armed with increased knowledge about the tourism industry, land-use planners will be better able to accommodate the needs of all industries.

In 2000/2001, a study of remote and semi-remote, resource-based, tourism businesses was undertaken by the Ontario Ministry of Natural Resources (Hunt *et al.* 2002). However, this report did not include any information about road-accessible resource-based tourism establishments in Ontario. This report fills that void of knowledge by providing information on the road-accessible component of Ontario's resource-based tourism sector. This report focuses mainly on providing descriptive information that was gathered on the road-accessible resource-based tourism industry through a survey with operators. Additionally, some comparisons are provided between the road-accessible establishments and fly-in, train-in, and boat-in establishments.

The next section of the report briefly discusses the methods used in surveying the operators, while the third section details the findings from this study and relates this information to that collected about non-road-accessible establishments. In the final section of this report, key findings from the study are summarized.

2.0 Methods

To gather some basic information about Ontario's road-accessible resource-based tourism industry, a survey was conducted with tourism operators. The survey, conducted in the fall and winter of 2001/2002, attempted to contact all operators of Northern Ontario's road-accessible resource-based tourism sites. The Ontario Ministry of Natural Resources sponsored the survey in partnership with the Northern Ontario Tourist Outfitters Association and the Ontario Ministry of Northern Development and Mines.

2.1 Definitions

Before we proceed, we need to clarify some of the terms used in this study. A tourism business refers to a company that provides tourism services and accommodations. A tourism establishment or facility refers to an individual location offering tourist accommodations. An establishment may be one of several types, including an outpost, a lodge, or a campground. One tourism business may have several separate establishments or facilities. For example, a tourism business may have three establishments: a lodge plus two outposts on remote lakes.

Prior to implementing the survey, it was necessary to identify and to compile a database of Northern Ontario's road-accessible resource-based tourism operators. For the purpose of this study Northern Ontario is defined as the area north of a line from Algonquin Park through to the French River (see Figure 1). This definition of Northern Ontario was chosen as it corresponds to the

Ontario Ministry of Natural Resources' (OMNR) northeastern and northwestern administrative regions. While soe may argue that the Parry Sound area (located in OMNR's Southcentral Region) should have been included in this study, the authors chose the definitions of Northeast and Northwest regions to be consistent with a previous study (Hunt *et al.* 2002) on remote and semi-remote tourism opportunities.

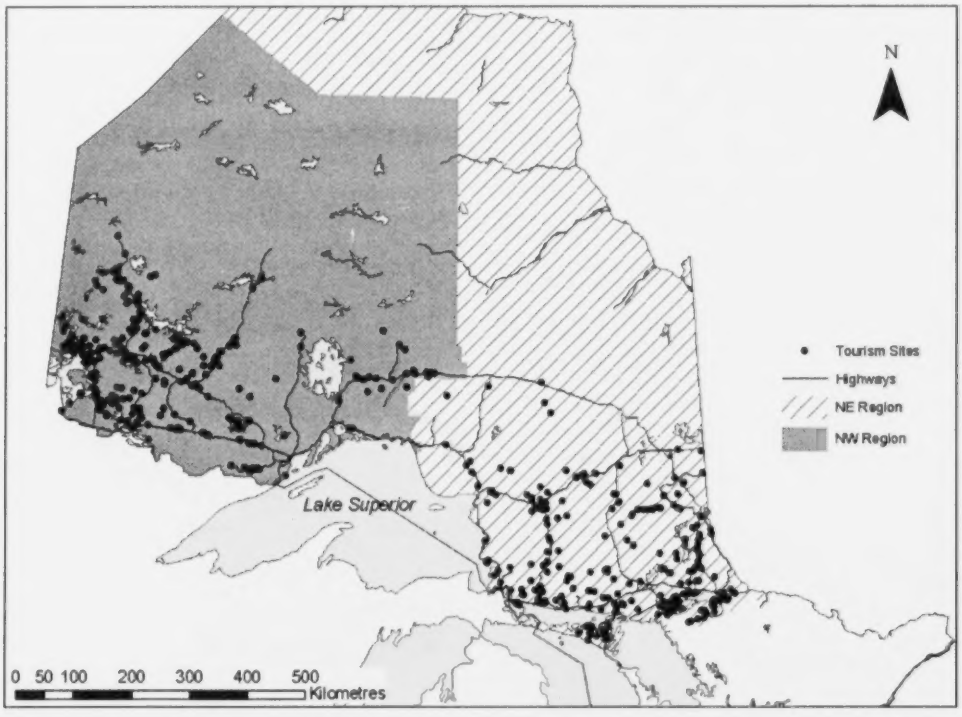


Figure 1. Delineation of Northern Ontario study area, showing Northeast and Northwest regions and locations of businesses requested to complete a surey.

A resource-based tourism business is defined as an established business that offers a tourist product that involves the use and enjoyment of the natural resources on Ontario's Crown (public) land (OMNR 2001). It includes such businesses as fishing or hunting lodges and wilderness retreats, but it does not include hotels and motels whose main clientele are not drawn to the resources surrounding the accommodation.

A road-accessible resource-based tourism establishment is one where the clientele arrive at the tourism establishment by road, usually in their own vehicles. A road may be either a public road with uncontrolled access, as in the case of a highway or logging road, or a privately controlled road where access is limited to only clients of the business. A non-road-accessible tourism business is one where the clientele cannot arrive at the establishment by road. Non-road-accessible sites are typically further defined as either remote or semi-remote establishments. For the purpose of this study, a remote establishment is defined as one accessible by plane, whereas a semi-remote establishment is accessible by train or boat. These access level definitions, which are not used by all resource managers, were chosen for this study based on prior research conducted by the authors (Hunt *et al.* 2000). The research showed a significant difference between the attitudes of fly-in operators and boat-in and train-in operators towards forest management planning. The expectations of clients regarding access and solitude were also found to be significantly different between these groups.

This study examines the difference between the consumptive and non-consumptive use of resources by the tourists. For the purpose of this study, consumptive use was considered to be the alteration or removal of natural resources by humans (Owen *et al.* 1998). Hunting and fishing were the only two consumptive activities considered by this study. Non-consumptive activities involve the use of our natural resources without alteration or removal. In this study, activities considered to be non-consumptive included photography, bird and/or wildlife watching, canoeing and/or kayaking, snowmobiling, cross-country skiing, hiking, all-terrain vehicle (ATV) touring, and boating without fishing.

2.2 Survey Methods

An initial database of 782 resource-based tourism businesses, complete with contact information, was compiled from brochures, web sites, and various government databases. While we believe that this database represents a reasonable approximation of the total number of road-accessible resource-based tourism businesses in Northern Ontario, it is beyond the scope of this project to verify that every resource-based tourism facility in the study area was accounted for in this database. By the same token, it was impossible (at least initially) to verify that all resource-based tourism businesses enumerated had at least one facility accessible by road. The operators of these businesses were mailed a questionnaire asking them to provide some basic information about their business, facilities, and clientele. Operators were assured complete confidentiality of their responses. To make comparisons between the remote (i.e. fly-in accessible), semi-remote (i.e. boat-in or train-in accessible) and road-accessible components of the resource-based tourism industry, the survey instrument closely resembled a prior survey conducted in 2000/2001 with operators of remote and semi-remote establishments. To maximize the survey response rate, the survey followed the surveying approach suggested by Dillman (2000). Operators were first sent a pre-notice letter explaining the purpose of the survey. A week later the survey package was mailed to operators, followed by a postcard reminder a week after that. A second survey was mailed to all non-respondents two weeks after the postcard reminder. Additionally, a copy of findings from a previous survey with operators was randomly included with the survey package sent to one-half of all potential respondents. We provided this token of appreciation as an incentive for operators to complete the survey.

A total of 491 surveys were returned yielding a response rate of 66 percent (see Table 1). It is possible that this response rate is conservative due to the difficulty in obtaining correct off-season mailing addresses for many of the businesses.

2.3 Potential Sources of Error

When interpreting these survey results, one must be aware of the potential errors that may affect the reliability of any survey responses. Errors that may potentially exist in the survey data include sampling error, coverage error, measurement error, and non-response error (Salant and Dillman 1994).

Sampling error, also known as statistical error, relates to the accuracy of generalizing results from a sample of individuals to the population of individuals. By assuming that non-responding operators do not differ from responding operators, we can estimate the accuracy of our sample results. During our sampling efforts, we mailed 782 surveys. The 491 surveys returned

Number of surveys mailed	782
Additional road-accessible facilities surveyed in 2000, and not re-surveyed in 2001	28
Initial estimated population of road-accessible resource-based tourism facilities	810
Number of undeliverable mailed surveys	41
Number of completed surveys returned	491
Survey response rate (based from deliverable mailed surveys)	66.3%
Number of facilities reported by responding operators	499
Number of facilities reported by responding operators that were road-accessible	431
Average number of road-accessible facilities reported per responding operator	0.88
Revised estimated population of road-accessible resource-based tourism facilities	715

Table 1. Response rate and estimated number of road-accessible resource-based tourism establishments in Northern Ontario.

by the tourism business operators provided information about 499 tourism establishments/facilities. Of those 499 establishments, 431 were road-accessible resource-based tourism establishments. Given this number along with information about road-accessible establishments obtained from earlier survey efforts, we revised our estimated road-accessible resource-based tourism establishment population down to 715 from our original estimate of 810 sites. See Table 1 for more details. Assuming our population estimate is correct, our survey results will be accurate within plus or minus three percentage points 19 times out of 20. For questions that were not completed by all respondents (i.e. item non-response) the error rate will be higher. For example, the question pertaining to package price, which elicited only 92 responses, results can only be considered to represent the population within plus or minus ten percentage points 19 times out of 20.

A second source of potential error in this survey arises from coverage error. Coverage error occurs when the database from which the survey names are drawn is not complete (Dillman 2000). It was beyond the scope of this study to enumerate all road-accessible resource-based tourism businesses prior to sampling. An attempt was made to identify as many road-accessible resource-based tourism businesses as possible, by collecting information from government databases and from web sites and brochures advertising the tourism sites. Consequently, businesses that were not licenced through the Ontario Ministry of Tourism and whose operators conducted little advertising may be missing from our list of active businesses. An attempt was made to differentiate between businesses with facilities that were truly resource-based, and businesses with facilities that were simply roadside hotels or motels. Due to our inability to determine whether some facilities were truly offering resource-based tourism packages, we may have introduced additional errors into the database.

A third source of bias can arise from measurement error. In surveying, measurement error often arises from wording questions poorly and results in answers that are unreliable or unusable (Dillman 2000). Attempts were made to word questions clearly based on previous surveying efforts with tourism operators. Nevertheless, we provide the exact wording of the questions in the table and figure captions to allow readers the opportunity to assess the degree of measurement error that may exist in this study. It is hard to determine which, if any questions were prone to measurement error; however, the following is a likely candidate. Question 12 asked: Which of the following amenities are available in a central location to all of your guests? Response categories included: store with general supplies; restaurant; sauna; central showers; phone or two way-radio communications; whirlpool and/or jacuzzi; other. This question was meant to assess the amenities located on the tourism establishment

property. It was discovered through the comments by some tourism operators that they interpreted this question to include amenities located a short drive away in a nearby town or village. The term restaurant may also have been somewhat ambiguous. While it was intended to represent an eating facility open to the public, responding operators may have included dining rooms, where meal-plan guests eat, in this category.

The fourth and final source of error is non-response error. Non-response error occurs when survey respondents differ from non-respondents in some factor key to the survey (Dillman 2000). Attempts were made to reduce non-response bias by using Dillman's tailored design method of multiple contacts.

As with any survey-based research, readers should consider all of the aforementioned potential sources of error when considering the results presented in the following sections.

3.0 Highlights of Questionnaire Responses

This section of the report describes Ontario's road-accessible resource-based tourism product, based on the responses operators provided to our survey. Survey respondents provided information for 499 establishments of which 431 were deemed to be road-accessible. Almost all, (99%) of these sites were operated as single business entities (i.e. operators owned and operated only one road-accessible resource-based tourism site). In the following sections, we provide information on business and facility characteristics, price and visitation rates, as well as a comprehensive examination of the fishing product. In the final section, we will compare the results of this survey with one that was conducted with remote and semi-remote resource-based tourism operators in late 2000.

3.1 Business Characteristics and Facilities

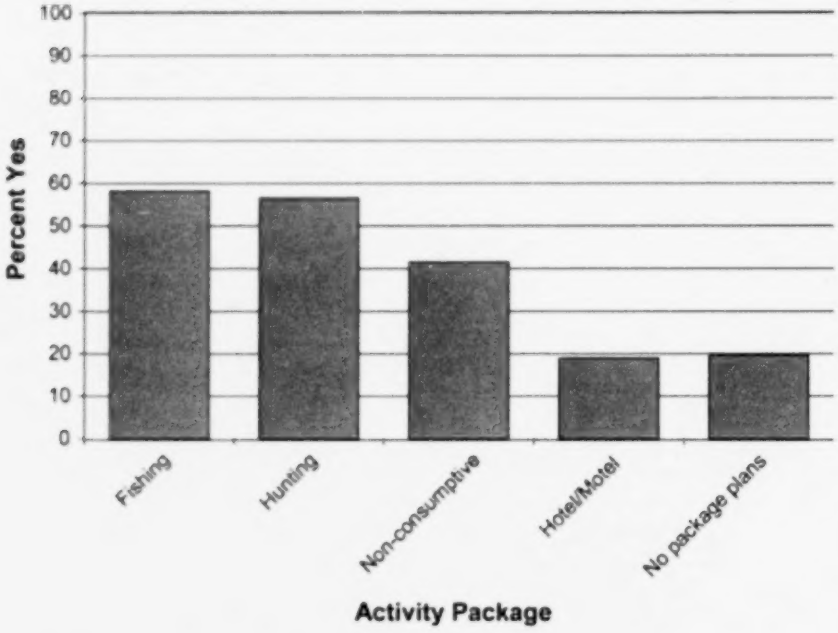
The road-accessible resource-based tourism product is very diverse. Facilities range from a basic one-room, tent-frame, hunting cabin to a luxury American plan eco-lodge. To help us understand the industry, this subsection details the typical road-accessible tourism business operating in Northern Ontario. Information relating to the business operation and the packages offered is presented. Following that, the report documents the types of amenities provided to guests of these establishments.

3.1.1 Package Types

Throughout the survey, operators were asked for information relating to the different types of recreational packages they offered to guests. The survey focused on four types of accommodation packages: accommodation packages centred around fishing, accommodation packages based on hunting, accommodation packages centred around non-consumptive activities, and simple hotel and/or motel style accommodations. Almost three-fifths (58%) of the road-accessible resource-based tourism establishments offered fishing packages (see Figure 2). Almost the same percentage of sites (57%) offered hunting packages. Forty-three percent of road-accessible resource-based tourism sites offered both fishing and hunting packages. Non-consumptive activity packages were offered by 42 percent of sites and overnight hotel and/or motel type accommodation was offered by 19 percent of sites. It is interesting to note that 20 percent of operators indicated that they did not offer any of the above package types. When this percentage is combined with the two percent of operators who offered only hotel and/or motel accommodation,

approximately 22 percent of surveyed operators stated that they did not offer any resource-based tourism packages. One explanation for this result may be à la carte pricing. Many operators commented that they did not officially offer any package deals, but rather guests were free to choose from a wide range of services including such things as boat and motor rentals and canoe rentals. This hypothesis is plausible since only five percent of reported visitor nights were for hotel and/or motel type accommodation.

Figure 2. Do you offer accommodation packages centred on ... (fishing, hunting, non-consumptive activities, and hotel-motel type) accommodation? (n = 426)



3.1.2 Accommodation Type

A second way to categorize businesses is through the type of accommodation packages offered. To estimate the distribution of available facilities, we asked operators to classify their establishments in one of six categories: housekeeping lodge and/or cottages, American plan lodge, combined housekeeping and American plan lodge, outpost cabin, tent frame outpost camp, or campground. An American plan lodge is a full service lodge. American plan packages typically include all meals, plus daily maid service. The packages offered at a housekeeping lodge and/or cottages do not include food, but may include weekly maid service to change linens and towels. Many housekeeping facilities are essentially self-catering cottages. A combined housekeeping and American plan lodge offers guests a choice of package. Some have combination packages that offer some meals but not others. An outpost cabin is usually a single cabin set alone in the wilderness. Outpost cabins tend to have basic accommodation. A tent frame outpost camp is a primitive one-room outpost cabin where the roof is made of canvas. A campground is an establishment that offers tent or recreational vehicle campsites for rent. While the above definitions are those of the study authors, responding operators interpreted the categories and categorized their business as they saw fit. Many operators described their businesses using two or more of the above categories (e.g. a lodge with a camping area was also described as a campground). Of the sampled sites, 69 percent were reported to be housekeeping lodges or cottages (see Figure 3). Just over

three percent were American plan lodges, while a further 23 percent offered a combination of American plan and housekeeping style accommodations. Five percent of operations offered outpost accommodations. About 42 percent of the operations offered campgrounds for their guests. Other types of resource-based tourism operations that were mentioned by operators included: houseboats, motel and/or hotels, seasonal trailers, guide services, and outfitters. Each of these categories accounted for less than one percent of the total survey responses.

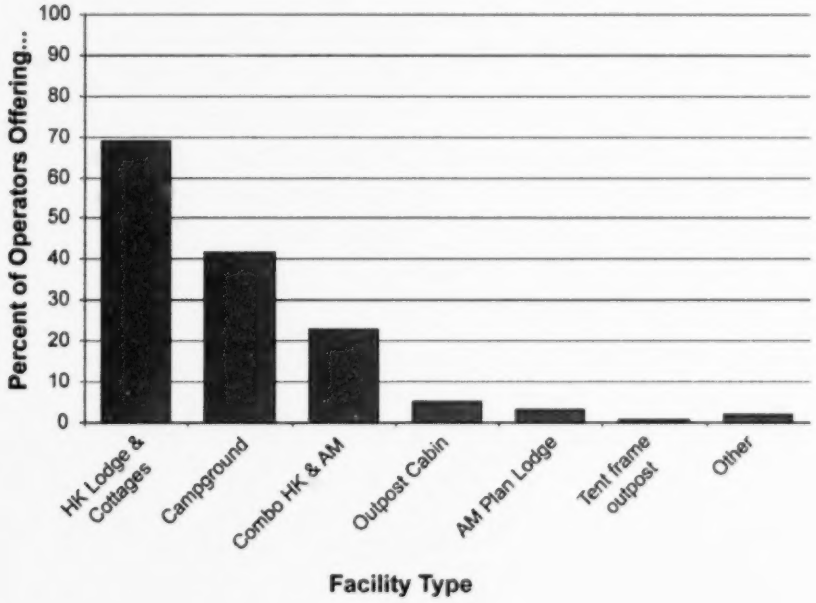


Figure 3. What best describes this facilty? (n = 425)
* Many operators checked off more than one category in response to this question.

3.1.3 Business Statistics

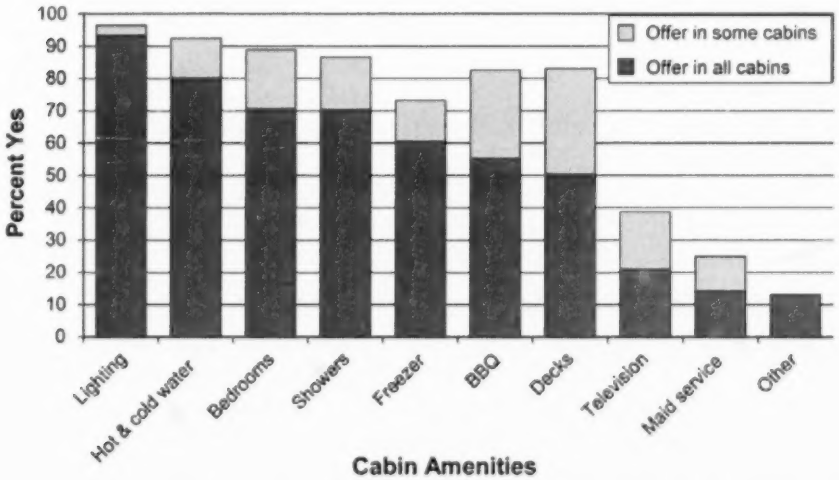
To gain a further understanding of the industry, operators were asked to provide some general information about the operation of their tourism business. Despite being accessible by road, nearly all (97%) road-accessible resource-based tourism operations in Northern Ontario were located on the shores of a lake or river. Twenty percent of drive-in tourism sites were accessible only by a controlled road. The remaining 80 percent had unrestricted access (i.e. an uncontrolled road), such as a provincial highway or a public logging road. The median operating season was 22 weeks during 2001, with most facilities open between 19 and 30 weeks. Many road-accessible sites were also open for the winter season. Approximately 23 percent of operators stated that they offered winter activities such as snowmobiling or cross-country skiing at their sites. Almost 15 percent of facilities were open for 52 weeks during 2001.

The median number of cabins or rooms available for rent at a single establishment in the year 2001 was eight. Most establishments offered between five and ten rental units. The capacity at the average road-accessible resource-based tourism establishment was 40 guests, with the majority of establishments offering bed capacity for between 26 and 55 guests. It appears that many of the tourism operators are constantly upgrading their facilities. Most operators stated that their establishment had undergone major renovation or construction in the past year (2000). Operators stated they have owned their business for an average of 13 years.

3.1.4 Amenities

To determine the amenities available at the tourism establishments, operators were asked to detail information about their sites. The majority of establishments offered well equipped accommodation units that included amenities such as: hot and cold running water, showers, lighting, freezers, a separate bedroom area, decks, and barbecues (see Figure 4). Only eight percent of facilities did not offer hot and cold running water and 13 percent of facilities did not offer showers. Of the sites not offering showers in the accommodation units, nearly three-quarters (72%) provided central showers instead. Therefore, only about three percent of facilities did not provide any shower facilities. All but four percent of facilities offered some kind of permanent lighting system in at least some of their cabins. Most facilities were more elaborate than a simple rustic cabin. Eighty-nine percent of sites offered cabins with bedrooms that were separated from the main living area. Other amenities frequently offered to guests were: decks (83%), barbecues (82%), and televisions (39%). Finally, operators were asked to list any other amenities available in their cabins that they believed were important to their guests. Microwaves were the most frequently mentioned item with about four percent of operators mentioning this item. Other items mentioned, in order of importance, were: fireplaces, separate docks for each cabin, full kitchens, lawn furniture, central heating, bedding and/or linens, fire pits, ceiling fans, air conditioning, free firewood, cable television, and carpeting.

Figure 4. How many of your accommodation units include the following amenities? (n = 413 - 421)



At many establishments additional amenities were available centrally for all guests to share. Over three-quarters (78%) of sites had a phone (or a two-way radio at more remote sites) that was available for guest use (see Figure 5). Many operations (55%) ran a store with general supplies that catered to guests and possibly to other travelers. One third (33%) of road-accessible resource-based tourism businesses had a restaurant on site. Other amenities offered centrally to guests included saunas (19%) and jacuzzis (7%). Over 60 operators mentioned additional central amenities that they felt enhanced their facilities. The most popular additional central amenities stated by operators in order of importance were: games and/or recreation room, gas pumps, laundromat, beach, bar and/or lounge, fish cleaning house, playground, internet access, gift shop, hiking trails, golf, swimming pool, firewood, boat rentals, and lastly bait and tackle. Clearly, there is great diversity in the central

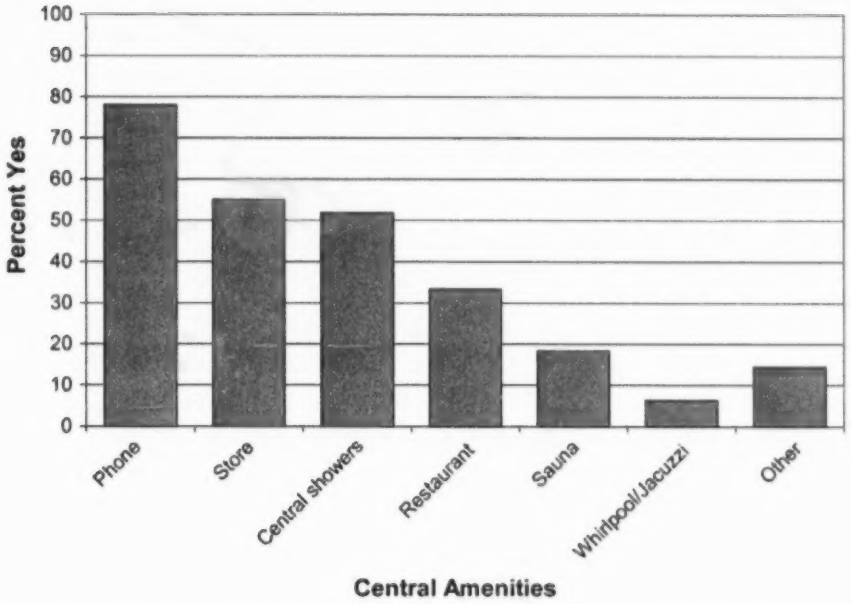


Figure 5. Which of the following amenities are available in a central location to all of your guests? (n = 403 - 431)

amenities that operators of road-accessible tourism sites provide to their guests. Readers are cautioned that respondents may not have interpreted the question pertaining to the availability of "central amenities" in the way that the authors intended. The authors intended that operators would describe the services that were available at their establishment. However, some respondents may have included restaurants and stores in nearby towns and villages.

3.2 Clientele and Visitation Rates

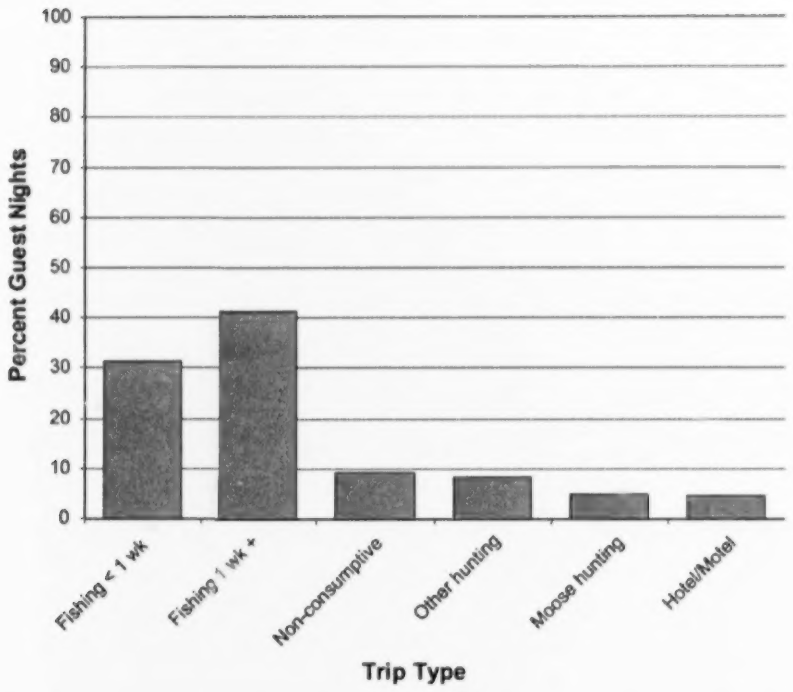
In this section, we provide some insight on the clientele visiting Ontario's road-accessible resource-based tourism properties. This examination includes the number of guests, the types of trips taken, and the length of these trips. The origin of guests and the marketing strategies used to attract them are also examined.

3.2.1 Visitation Rates

The average road-accessible facility saw 300 guests during the 2001 operating season, with a median length of stay of six nights per guest. Over 80 percent of the trips were for five nights or longer, and 40 percent of the trips were for seven nights. Only three percent of trips were for longer than seven nights. It is possible that some operators may have included seasonal campers when reporting use. At least one operator reported that his/her clients stayed an average of 120 nights each.

In addition to measuring the length of stay at road-accessible resource-based tourism facilities, we asked operators to separate visitation rates by activity type. Across Northern Ontario's road-accessible resource-based tourism industry the distribution of the type of trip taken is as follows. Fishing trips of less than one week in duration, accounted for 31 percent; fishing trips of one week or greater, accounted for 41 percent of the guest nights spent at these sites (see Figure 6). Given that almost three-quarters of the visitor nights spent by tourists were for fishing trips, the importance of fishing to the industry is obvious. Nearly five percent of guest nights were spent moose

Figure 6. Approximately, what percentage of guest nights at this establishment in 2001 were primarily for... (n = 379 - 381)



hunting, and an additional eight percent of nights were spent pursuing other hunting activities. Only nine percent of guest nights were spent on trips that were non-consumptive in nature. A further five percent of overnight stays were for hotel and/or motel type accommodation only. This information demonstrates that road-accessible tourism sites overwhelmingly cater to tourists who pursue consumptive activities. This information also provides a baseline that individuals can use to assess efforts to broaden the focus of a resource-based tourism product to provide additional opportunities for non-consumptive activities.

3.2.2 Origin of Visitors

The clientele for the road-accessible resource-based tourism product varies by the region in which the tourism establishment is located, and is dependent on its proximity to major urban centers (see Figure 7). For this reason, all results dealing with visitation are separated by location of the tourism destination.

In northwestern Ontario, Minnesotans accounted for nearly 23 percent of all visitors. Guests from both Wisconsin and Illinois accounted for an additional one-third of all visitors to this region. Iowa, North Dakota, and South Dakota were important origins of tourists as they accounted for a combined 11 percent of the northwestern Ontario road-accessible resource-based tourism market.

In northeastern Ontario, the major origin of guests was southern Ontario, which accounted for 43 percent of resource-based tourists staying at road-accessible establishments. While local Northern Ontarians provided a very small market for northwestern Ontario resource-based tourism establishments (4%), this market was more important for the establishments in northeastern Ontario (13%). Michigan guests represented 12 percent, and Ohio and Indiana guests combined to form 14 percent of the road-accessible tourism market in northeastern Ontario. Figure 7 shows the importance that geography has on the origins of tourists that use road-accessible resource-based tourism establishments.

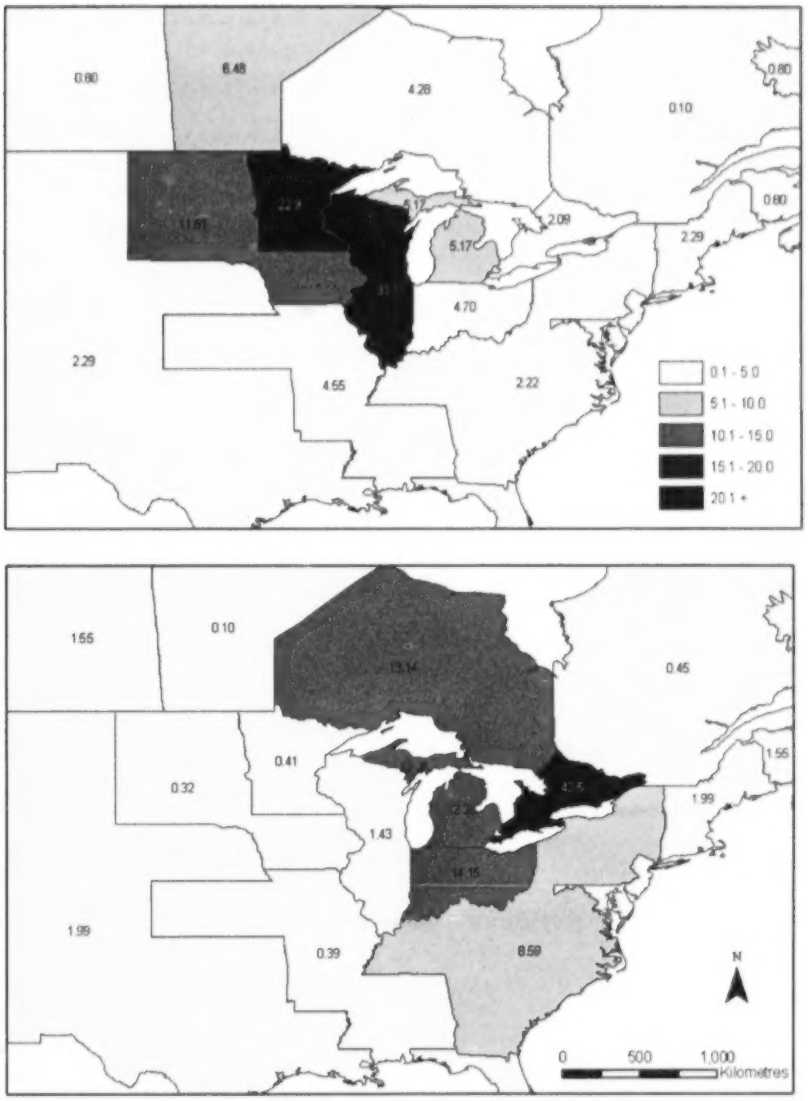


Figure 7. The origin of clients visiting road-accessible resource-based tourism establishments in northwestern and northeastern Ontario, 2001.

3.2.3 Marketing

The type and extent of advertising a tourism business conducts undoubtedly impacts the origin of visitors to the business. When targeting their clientele, most establishments (84%) advertised with brochures (see Figure 8). Business web sites were the second most popular form of advertising, with use reported at 63 percent of establishments. Magazine advertisements were also quite popular, and they were used to advertise over 46 percent of establishments.

The use of trade shows to advertise road-accessible resource-based tourism establishments was low. About one-third of the establishments were represented at United States trade shows and only about one in ten establishments were represented at Canadian trade shows. Few establishments were featured in magazines or on outdoors television shows. In fact, it is surprising to note that almost eight percent of operators did not use any of the advertising methods found in Figure 6. The reader should be cautioned that the percentage of sites conducting no advertising, could, in reality be higher than the value we report. Some establishments that did no advertising may

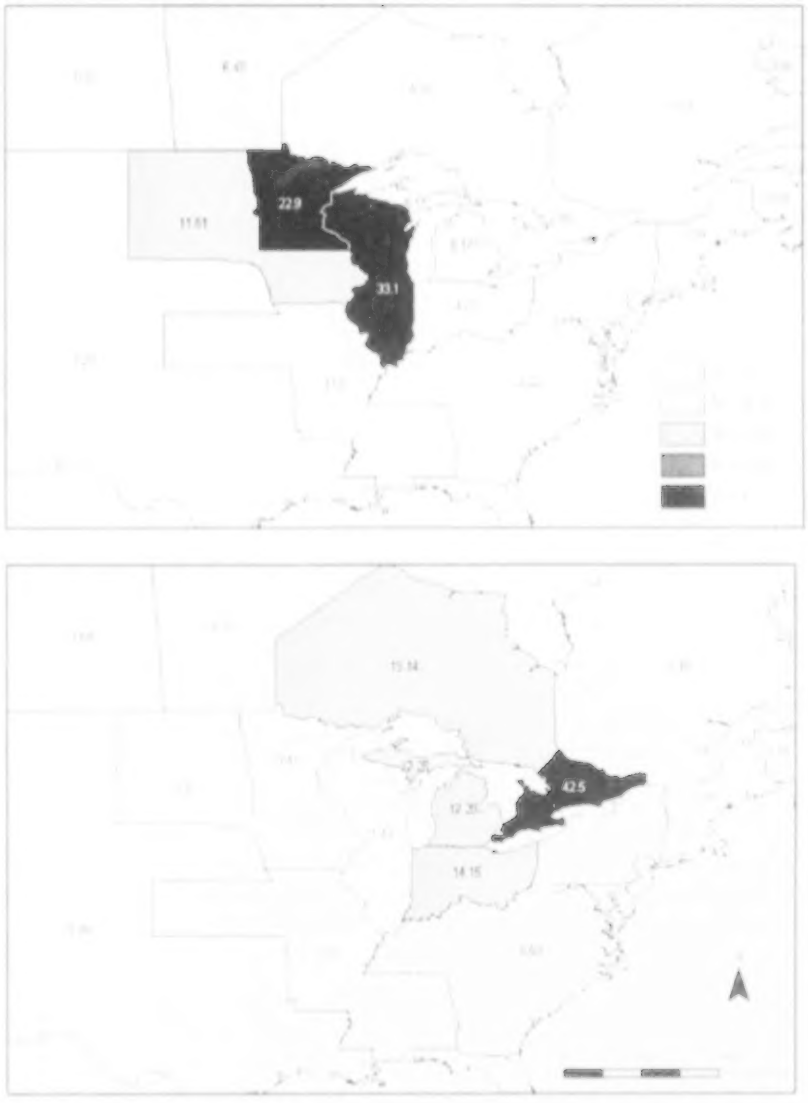


Figure 7 The origin of clients visiting road-accessible resource-based tourism establishments in northwestern and northeastern Ontario, 2001.

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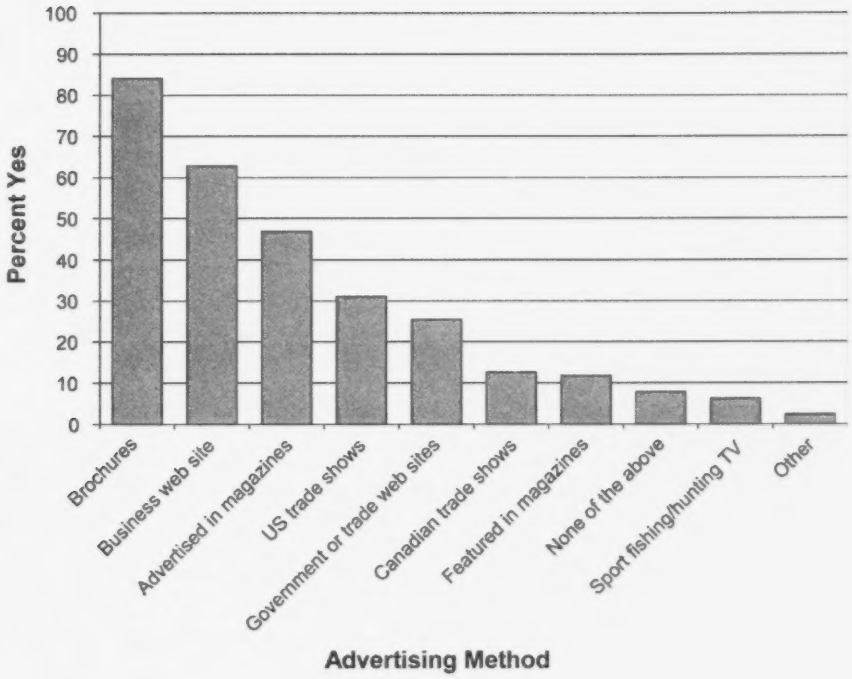
Figure 8. What methods of marketing and/or advertising did you employ in 2001? (n = 420 - 422)



have been omitted from the study since their existence and addresses would be difficult to identify. Finally, a few operators indicated that they used other methods of advertising not listed in the survey instrument. These methods included word of mouth (2%), radio (1%), and newspaper (1%).

3.3 Activity Based Questions

In this section, we provide information about the activities that are offered to guests at tourism sites. The use of our natural resources by recreationists can be divided into two categories: consumptive use and non-consumptive use. There is much debate about the use of the terms consumptive and non consumptive. However, for the purpose of this study the definitions provided by Owen *et al.* (1998) were used. Consumptive use was considered to be the alteration or removal of natural resources by humans. Examples of consumptive activities include hunting and fishing. Non-consumptive activities involve the use of our natural resources without alteration or removal (Owen *et al.* 1998). Non-consumptive activities include: photography, bird and/or wildlife watching, canoeing and/or kayaking, and perhaps even catch and release fishing.

Fishing, which is the most popular activity, is discussed in depth in a further section. In this section, we first pay attention to the second most popular activity: hunting. Moose hunting is given closer examination in the discussion because it is a large contributor to Ontario's hunting economy. Discussion of non-consumptive activities follows the discussion of hunting.

3.3.1 Hunting

The two main species that hunting tourists pursued were bear and moose (see Figure 9). Operators who owned tourism sites that offered hunting stated that bears were a very important hunting species at 67 percent of sites and were a secondary species at an additional 15 percent of sites. Moose was a very important species for 64 percent of the sites offering hunting and somewhat

important for an additional 12 percent of these sites. Fishing was also considered to be an important activity to hunting clientele with over 90 percent of operators stating that fishing was very or somewhat important to their hunting guests. Although less than half of tourism operators saw grouse, deer and migratory birds as very important to their hunting clientele, many operators stated that these species were of secondary importance to their guests. For example, only 38 percent of operators listed grouse as very important to their hunting clientele. However, grouse was listed as being somewhat important to their hunting clientele by an additional 46 percent of operators. Similarly, migratory birds were seen as very important by only 11 percent of operators, but somewhat important by an additional 32 percent of operators. Finally, although wolves were not listed on the survey instrument, nearly two percent of operators recorded this species in the "other" category that was available on the survey instrument.

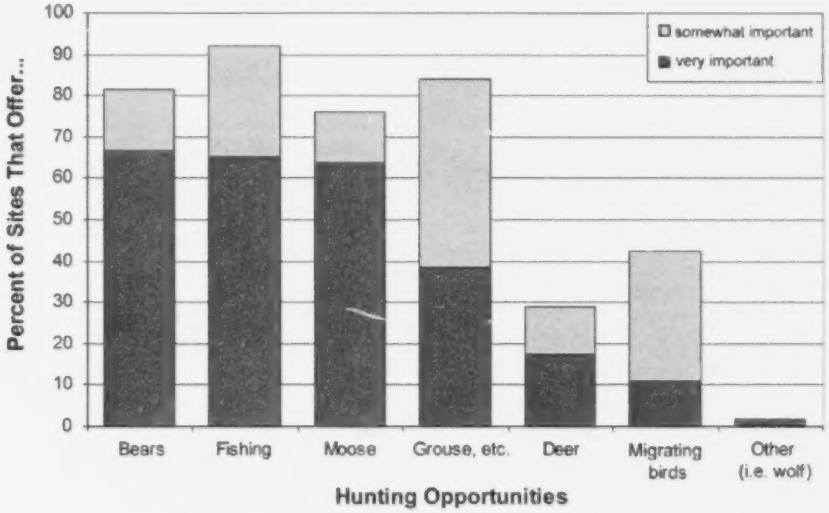


Figure 9. If yes, how important are the following game/activities to your hunting clients? (n = 238)

The vast majority of hunting outfitters (86%) offered gun (rifle) hunting. Almost 70 percent of hunting outfitters offered both bow and rifle hunting, while just two percent of operators who offered hunting offered solely bow hunts. We also found that 66 percent of tourism outfitters offered hunting guide services. Although we collected some basic information on hunting, the diversity of hunting activities and modes of hunting did not permit us to look at hunting package prices in a regimented fashion.

3.3.2 Moose Hunting

Moose hunting has one of the greatest economic impacts of all big game hunting in Ontario. In 1996 it was estimated that moose hunting contributed $78 million to Ontario's gross provincial income (Legg and Kennedy 2000). An additional question was asked to operators about moose hunting to estimate hunting success. We asked operators who offered moose hunting trips to estimate the average success rate of a party of hunters for harvesting a moose during their hunting trip. Overall, the average party of hunters could expect a success rate of 60 percent. When the success rates in Northwest and Northeast regions are compared, we find that the success rate in the northwest was higher at 66 percent and lower in the northeast at 50 percent. This difference may relate to a number of factors that include the hunting environment and the abundance of moose.

3.3.3 Non-consumptive Activities

Several questions were asked of operators about non-consumptive activities. Robinson *et al.* (1998), among others, posit that ecotourism could become an important industry in Northern Ontario. While the non-consumptive activities described in this section can not all be considered ecotourism activities, the study of non-consumptive activities does at least give us a conservative estimate of the popularity of this fledgling form of tourism.

Forty-two percent of responding operators indicated that they offered non-consumptive packages. These 42 percent of operators were then asked to list the types of activities pursued by clients on non-consumptive packages. Of the non-consumptive activities listed, two non-consumptive, non-motorized activities (i.e. wildlife and/or bird watching and canoeing and/or kayaking) topped the list. These were pursued at over 60 percent of the sites that offered non-consumptive packages (see Figure 10). Other activities available at over one-half of sites offering non-consumptive packages included motor boating, hiking, and snowmobiling. Less than two-fifths of the operators offering non-consumptive packages stated they offered all-terrain vehicle (ATV) touring and only one-quarter of these operators offered cross-country skiing. Operators also mentioned several other activities that they considered to be non-consumptive, and were pursued by their clients. These activities included, among others: sightseeing, relaxing vacations, golf, horseback riding, berry picking, and water sports.

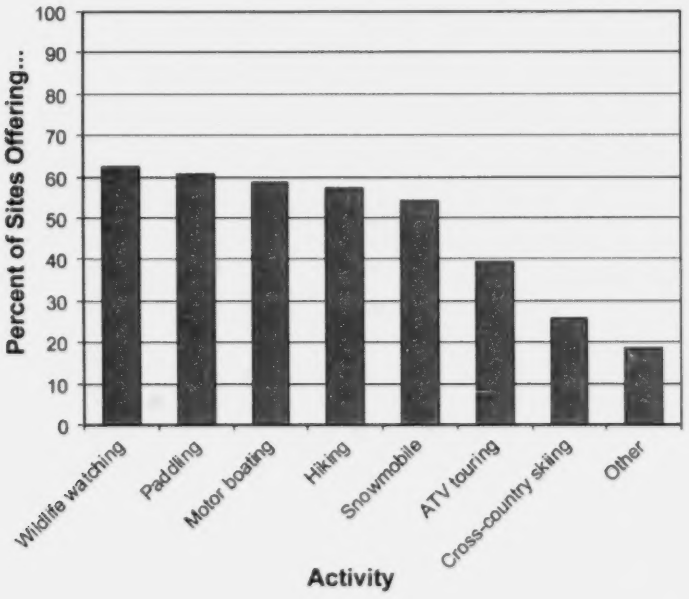


Figure 10. If yes, what activities do your clients primarily pursue? (n = 173)

While there seems to be some willingness on the part of operators to cater to non-consumptive tourists, this form of tourism is still very small when compared to the traditional rod and gun activities. This point is supported by the fact that only nine percent of guest nights were reported to be for non-consumptive activities.

3.4 Emphasis on the Fishing Product

The fishing product is a key component of the road-accessible resource-based tourism industry. Almost sixty percent of operators surveyed indicated that they offered fishing packages at their establishments. Furthermore, almost all (98%) responding operators reported that their guests fished at least some of the time while staying at their facility. This section provides details on the species targeted and the prices charged for fishing packages. Some additional details regarding the fishing product are also provided.

3.4.1 Fish Species

Of those road-accessible facilities where fishing was available, 75 percent of operators indicated that walleye was the primary species that their guests targeted. Smallmouth bass was the second ranked primary target species, but only eight percent of operators reported this as a primary target species. Northern pike and lake trout were listed by operators as a primary target species at only seven and six percent of sites respectively. Northern pike was the main secondary species, with operators reporting it to be the secondary target species at half of the locations. Twenty percent of operators reported that smallmouth bass was the secondary species pursued by their guests, making it the second most popular secondary species. Walleye was third at eight percent of sites, while lake trout and muskellunge followed at just over five percent each.

To assess the quality of fishing at Ontario's road-accessible resource-based tourism resorts, operators were asked to give estimates of the expected catch per unit effort for the primary and secondary species of fish sought in their lakes and to estimate the average weight of these fish. The catch per unit effort (CPUE) can be defined as the average catch rate for an individual angler for one hour of fishing effort. To facilitate this task, operators were asked to estimate the number of fish the average angler could expect to catch per four hours of fishing in the month of June (July for bass). It should be noted that this question was not intended to provide a definitive measure of fishing quality. Rather it is an easily obtained proxy measure that can be used to help estimate the fishing quality at a specific tourism site or area. The authors are aware that the actual CPUE may vary depending on the fishing equipment used, time of day, and the experience of the angler. The results of these two questions are displayed in Figures 11 and 12. Before proceeding, these box plots deserve some explanation. When interpreting these graphs one should compare the shaded boxes. The extent of these boxes represents the middle half of all values (i.e. the interquartile range). The solid bar through the box represents the median value. The other less important components of the graph are the whiskers which represent the range of almost all the values, and the O's and *'s, representing the outliers and extreme values respectively.

For those establishments that listed walleye as a primary or secondary target fish, the operators reported a median of four fish caught per four hours of fishing (i.e. a CPUE of one). However, this expectation ranged from no fish per four hours up to 60 fish in four hours (i.e. a CPUE ranging from 0 to 15). The median reported weight for an average sized walleye was two pounds (0.9 kg).

The median expected catch of northern pike in four hours was five (CPUE = 1.25), with the median expected weight of such a fish being approximately four pounds (1.8 kg). For smallmouth bass the mean CPUE was one fish, or four per four hours, with an average expected weight of two pounds (0.9 kg). For those

Figure 11. In June (July for bass), how many of these fish could an average angler expect to catch in four hours of fishing?
(n = 298, 201, 44, and 107)
There is one extreme for walleye that is off the scale of this graph.

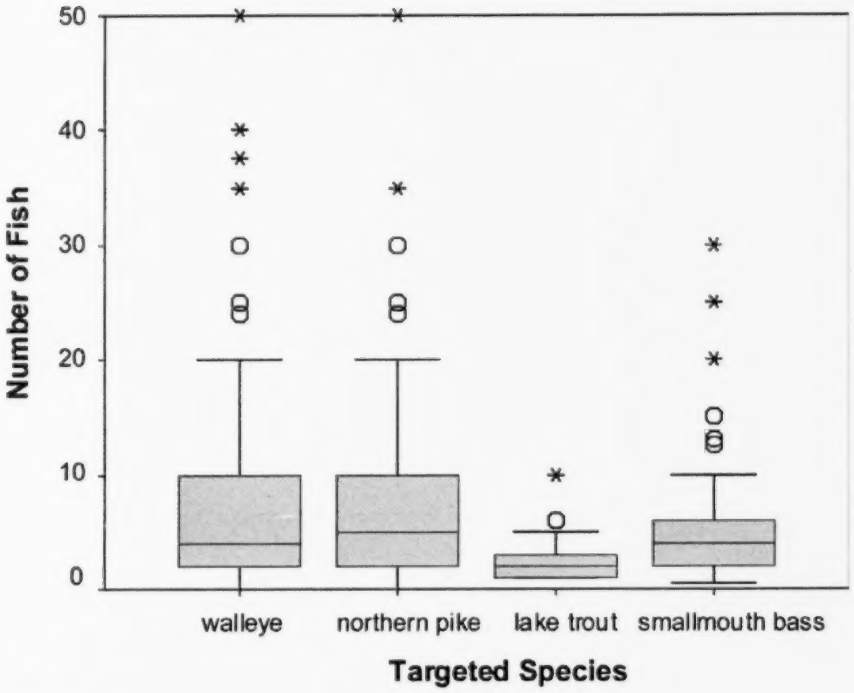
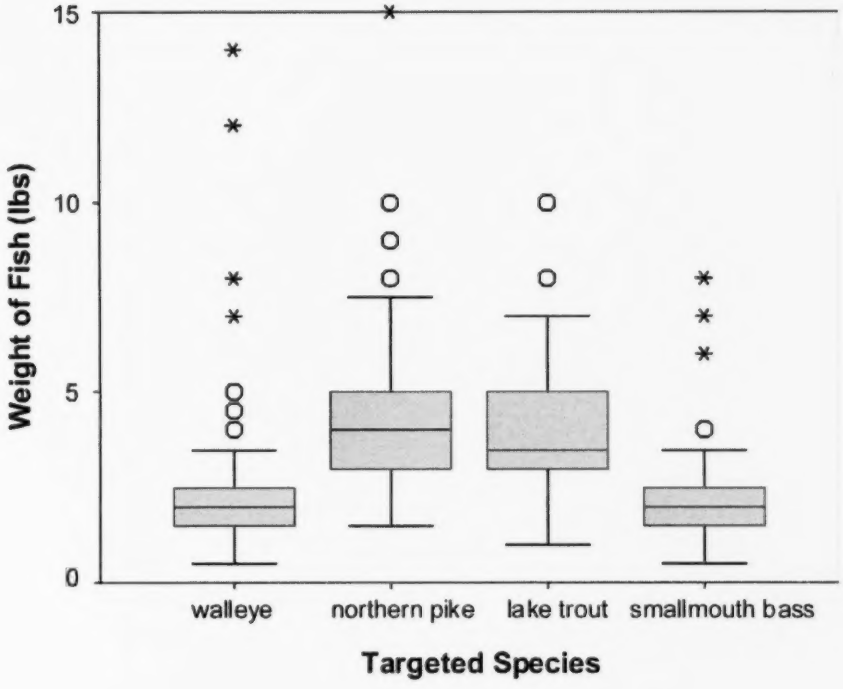


Figure 12. In June (July for bass), what would be the average weight of one of these fish (please specify in pounds)?
(n = 310, 205, 45, and 109)
There are three extremes for northern pike that are off the scale of this graph.



operations that listed lake trout as a target species the mean CPUE was 0.5, or two fish per four hours fishing with an average expected weight of 3.5 pounds (1.6 kg).

Next, the expected size and number of a species that operators stated could be caught was compared by the accessibility of the tourism site. Specifically, this comparison involved separating the product into sites with and without a controlled road. When we compared the mean number of expected fish at controlled road sites and non-controlled road sites, we found that the mean number of expected walleye was not significantly different between these two access categories. The mean expected weight of the walleye, as reported by the tourism operators, was also not significantly different between the two access types. Similarly the expected catch of northern pike, reported by operators, was not significantly different in either weight or numbers of fish. One reason for this finding may relate to the definition of controlled road used by this study. We categorized a site as controlled road access if the operator reported that they had controlled road access to their site. It is quite feasible that while tourism sites may have controlled access, the water body that the tourism site is situated upon may have uncontrolled access points.

3.4.2 Fishing Package Pricing

To understand some basic economic information around resource-based tourism facilities in Ontario, operators were asked to provide pricing information for their fishing product. We chose the fishing product since tourism operators were most likely to offer this package to their guests. The fishing product is also much more homogenous than any other product offered at the tourism sites. Indeed 58 percent of responding operators indicated that they offered fishing packages. About 57 percent of operators indicated that they offered hunting packages and 42 percent stated that they offered non-consumptive packages.

To allow us to standardize fishing package prices, operators were asked details about items included in their package price. These details included whether taxes were included and the currency of the prices. One hundred and three operators provided pricing information. Of these prices, 89 percent were for housekeeping packages and 11 percent were for American plan packages. In 2001, the median price for a fishing package at a housekeeping accommodation was $474 (n=92). This price is reported in Canadian dollars, per person for a standard party of four guests. The price included accommodation, a boat, motor, and gasoline for the motor. Taxes were not included in this price. The median price for an American plan fishing package in 2001 was $763 (n=11). However, the small sample size used to calculate this median value makes this estimate very tenuous.

The response rate to the price question was much lower than the remainder of the survey questions. It is speculated here that unlike the remote and semi-remote sites, which offer mostly all-inclusive fishing packages, the road-accessible product offers much more flexibility in the choice of accommodation packages. The pricing packages offered at road-accessible lodges range from the typical all inclusive American plan and housekeeping plan fishing packages, to à la carte cottage rentals, campsite rentals, boat and motor packages, winter accommodation packages, hunting packages, and various non-consumptive packages. Consequently, many operators may have had much difficulty providing a typical package price for fishing because every fishing party is unique in their needs.

3.4.3 Additional Questions Related to Fishing

Some additional questions were asked about fishing and the fishing product operators offered their guests. In addition to the main water body on which their establishment was located, operators were asked if their guests fished on surrounding water bodies. Two thirds of operators reported that their guests did fish on neighbouring water bodies. A follow-up question asked operators if they had boat caches on surrounding water bodies. Over one half of responding operators reported having at least one boat cache on a surrounding water body. Of those that reported owning a boat cache it was found that the median number per operator was three. Unfortunately, this question suffered from a high item non-response rate. Only 65 percent of responding operators answered the question pertaining to boat caches.

Operators were asked two questions about the use of the main water body by non-guests. First, operators were asked if they encouraged non-guest use of their water body by providing access to launch ramps and boat rentals. A total of 55 percent of sites had launching facilities available to non-guests (see Figure 13). This was made up of 24 percent of sites that offered a free boat launch to non-guests and 31 percent of sites that offered boat launching at a cost to non-guests. Many of the launch ramps that were available free of charge to day users were identified by operators as being public access points. A second part of this question asked operators if they offered boat rentals to day users. Over 56 percent of respondents indicated that they did offer boat rentals to day users. These results seem to indicate that most operators are not concerned about the use of water bodies by non-guests. On the contrary, they encourage it by providing access and boat rental opportunities. A second question asked operators directly if they were concerned about access to their water body by non-tourism guests. Of those that had facilities located on a water body, 37 percent felt that there were access concerns on their lake or river. In this question access was defined negatively, but at least one operator complained

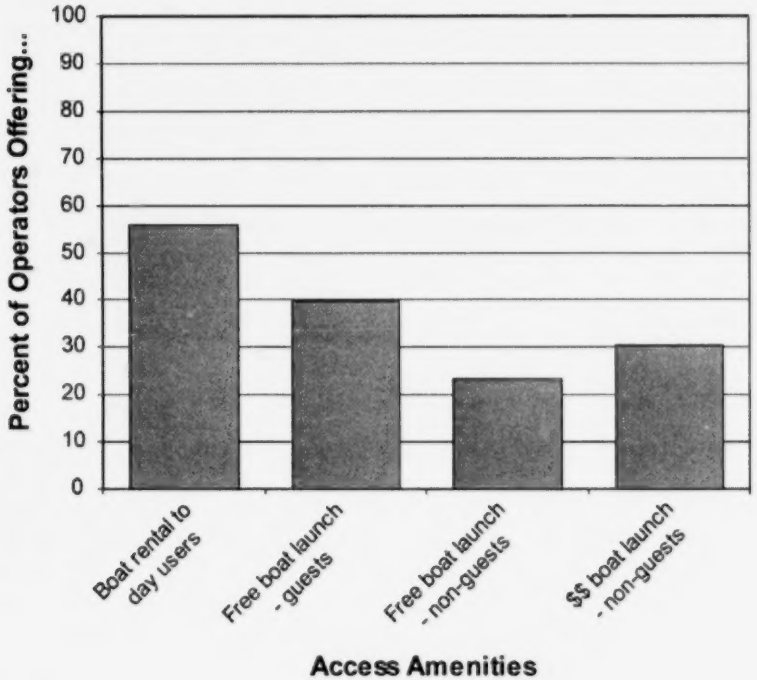


Figure 13. Do you offer any of these additional services at this facility? (Please check only one box)* (n = 399)

that there wasn't enough access to the lake (i.e. it was hard for guests to get to his lodge).

Various road management strategies may be put in place for the protection of tourism values or for ecological reasons. Access restrictions amount to the most formal method of limiting use of areas by recreationists. Twelve percent of operators indicated that there were access restrictions around the lake that their tourism site depended upon. At about half of these sites, operators still perceived access problems even after access controls had been put in place. Due to the small sample size (n=47), these results should be interpreted with caution.

3.5 Comparison to the Remote and Semi-remote Resource-based Tourism Product

In addition to the resource-based tourism businesses that are road-accessible, Ontario offers a large number of non-road-accessible resource-based tourism opportunities. We further separated the non-road-accessible facilities by remote and semi-remote designations. Remote facilities refer to sites that are only accessible by float plane. Semi-remote facilities refer to sites that are accessible by either boat or train.

The road-accessible and non-road-accessible products, while similar in many regards, are actually quite different products attracting a different type of clientele. The motivation of clientele visiting non-road-accessible facilities frequently extends beyond the simple act of catching fish. These clients are searching for more of a wilderness experience. Haider and Carlucci (1994) list some motivations for visiting remote sites: getting away from people, fishing wilderness areas, getting away with friends, seeing wildlife, and fishing lakes that are accessible by air only. In this section, we will compare and contrast the features of the road-accessible resource-based tourism product with its remote and semi-remote counterparts. For an in-depth description of the remote and semi-remote resource-based tourism industry in Ontario, please refer to Hunt *et al.* (2002).

3.5.1 Business Characteristics and Facilities

When comparing the road-accessible and non-road-accessible tourism sectors, an obvious difference relates to the type of trips offered. Figure 14 shows the visitation rate by activity type for the three different access levels. At first glance, we can conclude that fishing is vitally important for all three products, but more important for the remote tourism product. At road-accessible establishments, anglers accounted for 73 percent of all guest nights whereas at remote establishments anglers accounted for 95 percent of all visitor nights. While the remote product is still almost entirely oriented toward fishing and to a lesser extent toward moose hunting (4%), the road-based tourism product is more diversified. Twenty-two percent of the guest nights at road-accessible resource-based tourism establishments were for non-consumptive, other hunting or hotel or motel type accommodations. While fishing trips to remote establishments were typically for less than one week (57% of all visitor nights), fishing trips at road-based establishments were more frequently for one week or longer (41% of all visitor nights) than for less than a week. These facts demonstrate that the types of activities that guests pursue are related to the accessibility of the tourism facility.

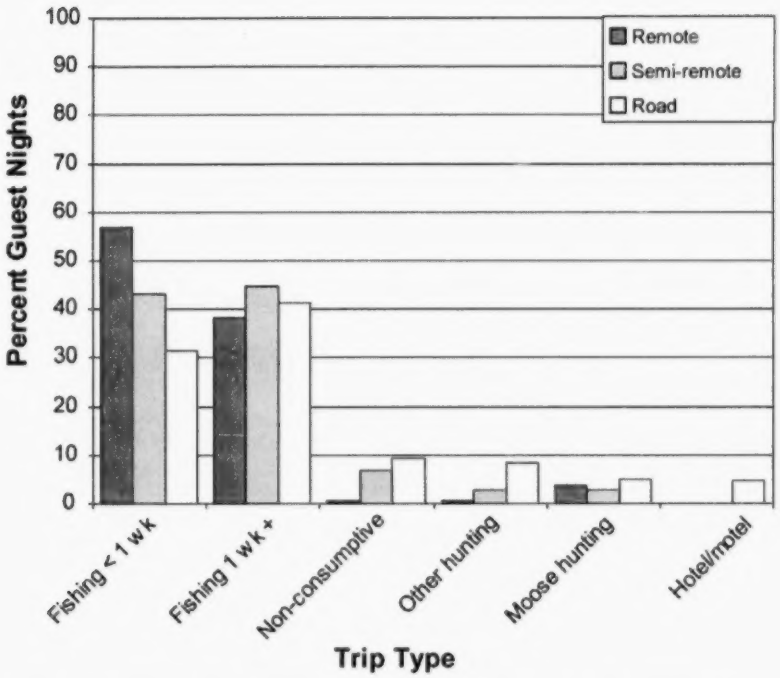


Figure 14. Approximately, what percentage of guest nights at this establishment in 2001 were primarily for... *and* About what percentage of the person nights at this establishment in 2000 were primarily for... (Data compiled from both the remote and road-based survey)?(n = 340, 124, and 380)

The accessibility of the tourism product also provides a useful way to examine many of the operating characteristics of the businesses. However, this comparison is complicated by the fact that many resource-based tourism businesses offer both remote and road-accessible opportunities, with the typical scenario being a road-accessible lodge offering fly-outs to remote outpost camps. The first comparison between the road-accessible tourism product and the non-road-accessible tourism product relates to the structure of the businesses. While there is often only one road-accessible facility per resource-based tourism business, remote facilities tend to be offered in clusters, with an average of 2.5 facilities per resource-based tourism business. Another difference relates to the size of the facilities. Road-accessible facilities had an average capacity of 40 beds. The average bed capacity of a remote site is eight beds with the majority of remote facilities being outpost camps. However, when this is aggregated at a business level, the number of remote beds per business jumps to 38, very similar to that of road-based facilities. A third difference relates to the operating season at the different business types. Remote and semi-remote facilities operated for an average of 20 weeks per year while the road-accessible facilities operated for 22 weeks on average. Furthermore, 15 percent of road-accessible facilities operated year round (52 weeks), compared to less than one percent of semi-remote facilities. No remote facilities were open for longer than 28 weeks a year.

The extent of amenities offered at tourism facilities was also related to the accessibility of the site. At a broad scale, one would be tempted to conclude that road-accessible facilities have more amenities. However, this trend is deceiving. The amenities offered at remote and semi-remote establishments are highly correlated to the type of establishment (i.e. lodge versus outpost). When specifically comparing remote and semi-remote lodges with road-accessible lodges, we find that remote and semi-remote lodges offer many amenities with equal or greater frequency than do road-accessible lodges. Such amenities include lighting, hot and cold running water, showers, refrigerator

and/or freezer, and separate bedrooms. On a broad scale however, a remote site is more likely to be an outpost type establishment and therefore offer fewer amenities.

3.5.2 Clientele

Another distinguishing aspect between the different accessibility levels relates to their market areas. Road-accessible facilities draw much more heavily from geographically close markets than do remote facilities. This geographic difference in market shares could result from several reasons. First, operators of remote facilities may have targeted advertising over a wider area than did operators of road-accessible facilities. This tenet is supported by the fact that remote operators were more likely to advertise to a U.S. market (e.g. over 80% of fly-in facilities and only 30% of road-accessible facilities were advertised by operators who attended a U.S. sport fishing trade show). The use of web pages was also more prevalent amongst operators of remote facilities. Nearly 90 percent of all remote and semi-remote facilities were advertised on the Internet. In comparison only 63 percent of drive-to facilities had web sites. The reader is warned that these results may be skewed due to the fact that many remote businesses had multiple facilities creating a seemingly larger portion that had web pages.

A second factor that may allow remote facilities to draw from a larger market than road-accessible facilities may have been a lack of intervening opportunities for the remote product. Simply put, the remote product offers a fly-in tourism experience to a remote area that is likely unavailable in most of the continental United States. The road-accessible product must compete with other road-accessible tourism facilities in the continental United States, and consequently, road-accessible facilities of Northern Ontario may have limited markets from which to draw upon.

The fishing package prices provide an opportunity to compare the price differences between the various tourism products defined by accessibility of the facilities. The price of a week-long housekeeping package at a fly-in lodge or outpost (remote facilities) was on average $1,000 Canadian per person in the year 2000. The median price charged at a boat-in or train-in (semi-remote) facility in 2000 was slightly under $500. The median price for a week-long housekeeping package at a road-accessible facility was approximately $450 per person in the year 2000. This price difference between remote and non-road-accessible facilities does not appear to be only explainable by flight costs, which Hunt *et al.* (2002) state the average is about $250.

3.5.3 Fishing Quality

One reason for the higher prices charged at remote tourism facilities, relates to quality of fishing. When comparing the remote fishing experience with the road-accessible fishing experience, we find that the fishing expectations, as reported by the tourism operators, correspond to the accessibility of the site. The reported number of fish an angler could expect to catch for four hours of fishing effort increases with increasing remoteness (see Figure 15). During four hours of fishing at the average road-accessible resource-based tourism establishment, operators claim one could expect to catch four walleye (CPUE = 1). At a semi-remote establishment, the expected catch for walleye is 10 fish per four hours (CPUE = 2.5) and at a remote lodge or outpost an angler could expect to catch 20 walleye in the same time period (CPUE = 5).

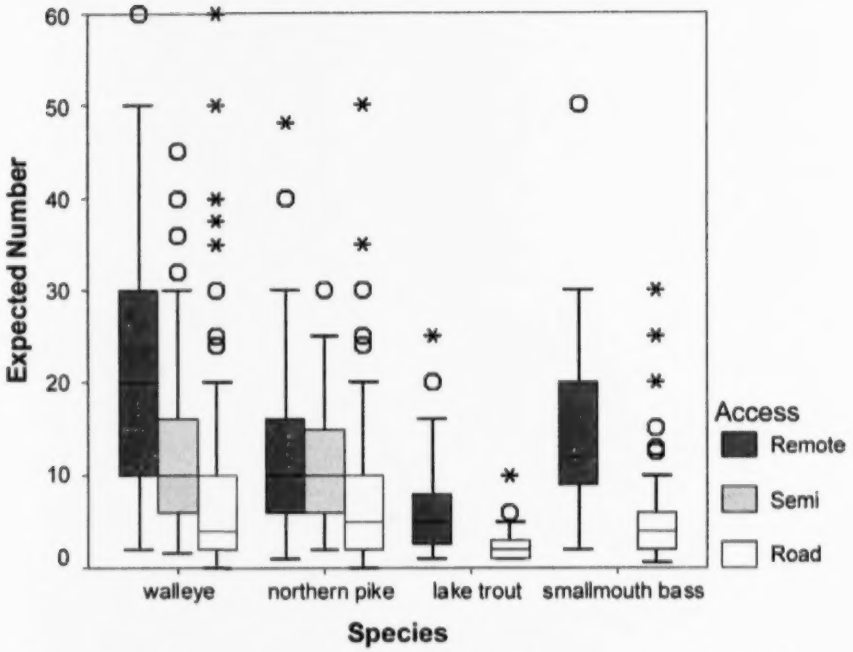


Figure 15. In June (July for bass), how many of these fish could an average angler expect to catch in four hours of fishing? Separated by access type. (Data compiled from both the remote and road-based survey.) (n = 285, 94, 298, 77, 201, 35, 44, 79, 43, 107, and 150)

We see a similar trend in expected catch rate differences among the tourism sites for northern pike, lake trout, and smallmouth bass. Operators of remote sites estimate northern pike catches of about 10 fish per four hours of fishing (CPUE = 2.5). Whereas, operators of road-accessible sites estimate northern pike catches of about five fish per four hours of fishing (CPUE = 1.25). For expected catch rates of lake trout, the estimates range from a CPUE of 1.25 fish at remote sites to a CPUE of 0.75 at road-accessible sites. Finally, smallmouth bass catch rates range from a CPUE of three at remote sites to one at road-accessible sites. These numbers suggest that perceived catch rates among the tourism operators are dependent upon the accessibility of their facility. This data also suggests that the price differences between remote and road-accessible sites may be partially explainable by differences in perceived catch rates as reported by the tourism operators.

Despite the strong relationship between accessibility and expected catch rates of fish, little relationship exists between accessibility and the expected size of caught fish (see Figure 16). For walleye, lake trout, and smallmouth bass, the expected size of caught fish is equal for the different access forms of the tourism product. For the expected size of northern pike, there is a weak relationship between access and size. The median expected size of northern pike is five pounds (2.3 kg) at remote sites while it is four pounds (1.8 kg) at non-remote sites. Furthermore, the variability of the estimated sizes for northern pike also suggest that remote sites have, on average, larger expected northern pike sizes than do non-remote sites.

As expected, there were on average more access concerns among operators of remote and semi-remote sites than among operators with road-accessible sites. Operators of remote lodges had the highest concern about access. Operators of 64 percent of remote lodges stated there was an access problem. Road-accessible sites were felt to have access problems in 37 percent of cases. Surprisingly, operators of remote outposts reported the lowest level of access concerns at 33 percent (see Figure 17). There are a few possible reasons for this apparent lack of concern on the part of a remote outpost operator. First,

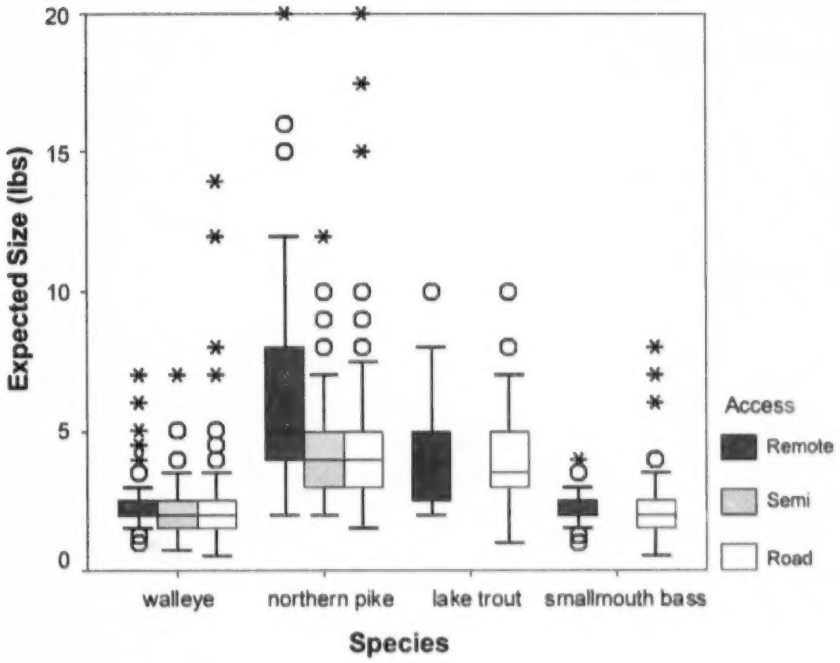


Figure 16. In June (July for bass), what would be the average weight of one of these fish (please specify in pounds)? (Data compiled from both the remote and road-based survey.) (n = 292, 96, 310, 277, 75, 205, 35, 45, 80, 42, and 109)

remote outposts are most likely to be located far away from current forest management activities, and therefore, they may not have any roads nearby to the lakes upon which their tourism business depends. Second, a single outpost often represents just one portion of an operator's business. By contrast, an operator of a remote lodge usually does not own additional tourism sites. Therefore, operators of lodges may be more concerned about access around their only facility than would operators who own many outposts. Third, operators who own road-accessible facilities offer a product that usually does not depend on the remoteness of the location. Therefore, guests visiting road-accessible facilities may be less sensitive to encounters with other anglers than would guests who choose more remote trips.

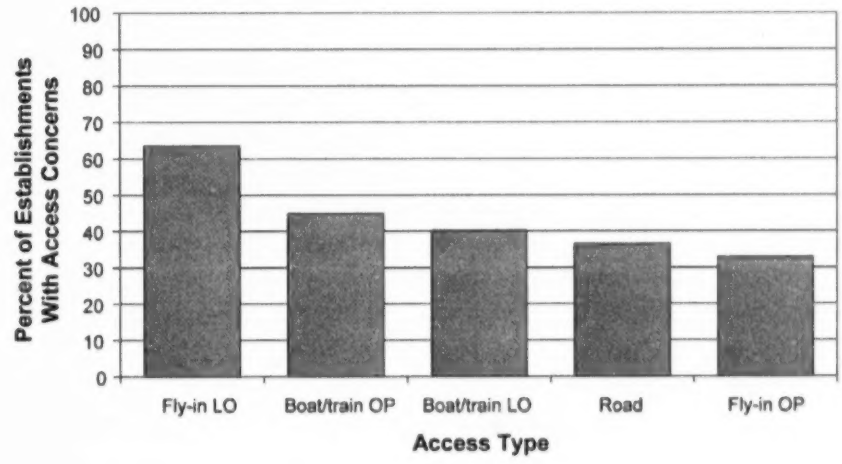


Figure 17. Are you concerned about access to this water body by non-tourism guests? *and* Do you feel there are road access problems around the water body? (n = 52, 49, 82, 412, and 338)

4.0 Concluding Remarks

With close to 1,200 remote and semi-remote facilities and 700 road-accessible establishments, the resource-based tourism sector is an important component of the economy of Northern Ontario. This report provided much needed descriptive information on Ontario's road-accessible resource-based tourism product. The preceeding section of the report highlighted some key differences between the remote, semi-remote, and road-accessible sectors of the resource-based tourism industry. This information should be valuable to resource management planners and decision makers, as it demonstrates that the resource-based tourism industry should not be considered a homogenous product.

One key finding of the study was the importance of fishing to the entire industry. While many individuals are trying to encourage the growth of the non-consumptive sector, the findings from this report suggest that only a small number of guest nights were attributable to non-consumptive resource-based activities.

There is still much research needed on the resource-based tourism industry, including the effects of environmental impacts and policy. A more detailed study around the hunting product and a more detailed study of the non-consumptive product could also prove useful. The authors hope that this document will provide some of the baseline information needed for these future studies.

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